

Goals:

Save \$0.66 to avoid commission fees.

Research ways to adjust risk tolerance.

Research Stocks priced at \$2.00

1) RSI and Standard Deviation

2) Earnings Per Share, Dividends per share

3) Current Assets, Accounts Receivable,

4) other current assets

5) Short Term notes(if any)

Build a Diversified Portfolio

Work on Identity Verification

1) Ask each financial institution which report they soft pull from to verify an application.

Charitable Remainder Trust:

Research and consult different discount brokerage firms, to see if they offer corporate trustee services. Charles Schwab does, but it seems like they don't offer a fee range for my type of assets. I am awaiting for an email from them for further information. I reached out to Merrill Edge regarding whether or not they can be a trustee, I am awaiting an email as well.

Betterment offers trust accounts, for trustees, they require the actual trust documentation to be reviewed. I asked SNHU's director of development and he said SNHU is just the beneficiary. Merrill Edge doesn't really act as a trustee, but they do offer trust accounts.

Based off my research I see that most trust companies and fiduciaries have fees that are so high that it would eat away my trust- estate. If not the fees, they don't manage the type of assets I placed in my charitable remainder unitrust.